



Evaluation of TV viewing for the 2016 Tour de France

An international perspective

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1. DATASET

- In this report, TV viewing for the 2016 Tour de France for the following 14 TV markets is analysed: Australia, Denmark, Flanders, France, Germany, Italy, the Netherlands, Norway, Spain, Sweden, Switzerland (German speaking part), the UK, the US and Wallonia. Two new markets were added to the dataset this year: Sweden and the German speaking part of Switzerland.
- In these 14 markets, in total 22 TV channels were monitored.
- For these 22 channels, TV audiences for 26 Tour de France broadcasts were analysed: 21 race coverage broadcasts and 5 talkshow broadcasts. A complete survey of all the broadcasts in the dataset is presented in the table below.
- Detailed stage level data for all 21 stages were collected for all markets, except for Australia (only information on 12 stages) and Switzerland (where only 15 stages were broadcast).

DATASET

Market	Race broadcaster (duration)	Talkshows (broadcast moment)
Australia	SBS One (unknown)	
Denmark	<i>Simultaneous broadcasts:</i> TV2 (full) TV2Sport (full)	
Flanders	VRT (full)	VRT: Vive le Vélo (late evening)
France	<i>Sequential broadcasts:</i> France3 (first part of the broadcast before 15h) France2 (second part of the broadcast from 15h until finish)	France3: Village Départ (before stage) France2: Vélo Club (after stage)
Germany	<i>Simultaneous broadcasts:</i> ARD (final 1 to 2h only) Eurosport (full)	
Italy	<i>Sequential broadcasts:</i> Rai3 (first part of the broadcast) Rai3 (final part of the broadcast, usually about 1h) <i>Simultaneous broadcasts:</i> RaiSport (full) Eurosport (full)	Rai3: Processo alla tappa (after stage)
The Netherlands	<i>Simultaneous broadcasts:</i> NPO1 (full) Eurosport (full)	NPO1: De Avondetappe (late evening)
Norway	TV2 (full)	
Spain	<i>Sequential broadcasts:</i> Teledporte (first part of the broadcast) Teledporte (most stages) OR La1 (selected number of stages) (final part of the broadcast, usually about 1h)	
Sweden	<i>Simultaneous broadcasts:</i> TV4 (full) Eurosport (full)	
Switzerland (German speaking)	SRFZwei (mixture of (very) small broadcasts & longer broadcasts)	
United Kingdom	ITV4 (Highlights show broadcast in early evening)	
USA	NBCSC (unknown)	
Wallonia	RTBf (full)	

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2. ANALYSIS OF AVERAGE AUDIENCES

- Compared to the record breaking audiences of last year, global TV ratings dropped by over 15% in 2016 in the 12 markets for which historical information since 2010 has been collected (Australia, Denmark, Flanders, France, Germany, the Netherlands, Norway, Spain, Sweden (Eurosport only), the UK, the US and Wallonia): from 10,58 million to 8,96 million viewers. As a result, Tour de France TV audiences fell to their lowest level since 2010.
 - Tour de France TV audiences have decreased in all markets, except for the UK (+ 2%). The biggest losses were recorded in Germany (-33% for Eurosport and -1% for ARD), the Netherlands (-32% for NPO), Spain (-29% for the first part of the race and -26% for the final hour), the US (-19% for NBCSN), Norway (-19% for TV2) and Flanders (-18% for VRT). Although the Netherlands, Spain and Norway all produced historical peaks in Tour de France TV ratings in 2015 and therefore were likely to witness a fall this year, the size of the drop is surprisingly large. A complete survey of the average audiences for all markets is presented in the table below.
- ➔ We conclude that the 2016 Tour de France has been unable to follow up on the TV success of the 2015 Tour de France, which was the best watched Tour de France of the past 10 years.

AVERAGE VIEWING PER TOUR STAGE international comparison

<i>Markets with complete information</i>	2010	2011	2012	2013	2014	2015	2016	% change vs. 2015	% change vs. peak (since 2010)
Australia (SBS One)	310.000	<u>502.000</u>	398.000	228.000	205.000	263.000	240.000	-9%	-52%
Denmark (TV2)	402.000	<u>460.000</u>	313.000	297.000	259.000	297.000	262.000	-12%	-43%
Flanders (VRT)	538.000	<u>586.000</u>	522.000	448.000	467.000	578.000	476.000	-18%	-19%
France (France 2, after 15h)	3.286.000	3.760.000	3.400.000	3.980.000	3.800.000	<u>4.029.000</u>	3.524.000	-13%	-13%
France (France 3, before 15h)	1.900.000	2.700.000	2.260.000	<u>2.850.000</u>	2.400.000	2.528.000	2.400.000	-5%	-16%
Germany (ARD)	1.257.000	<u>1.268.000</u>	0	0	0	1.148.000	1.132.000	-1%	-11%
Germany (Eurosport)	380.000	360.000	<u>430.000</u>	<u>430.000</u>	340.000	350.000	235.000	-33%	-45%
The Netherlands (NPO)	771.000	1.020.000	779.000	745.000	680.000	<u>1.104.000</u>	746.000	-32%	-32%
Norway (NRK2)	149.000	172.000	124.000	138.000	143.000	<u>174.000</u>	141.000	-19%	-19%
Spain (final part, "La llegada")	769.000	795.000	1.262.000	1.022.000	1.218.000	<u>1.320.000</u>	982.000	-26%	-26%
Sweden (Eurosport)	32.000	36.000	<u>40.000</u>	35.000	25.000	31.000	28.000	-10%	-30%
United Kingdom (ITV4)	434.000	563.000	<u>705.000</u>	606.000	625.000	687.000	698.000	2%	-1%
United States (NBCSN)	<u>456.000</u>	334.000	290.000	287.000	288.000	365.000	296.000	-19%	-35%
Wallonia (RTBf)	215.000	<u>280.000</u>	236.000	189.000	188.000	231.000	200.000	-13%	-29%
Total	8.999.000	10.136.000	8.499.000	8.405.000	8.238.000	<u>10.577.000</u>	8.960.000	-15%	-15%
Total without Germany (ARD)	7.742.000	8.868.000	8.499.000	8.405.000	8.238.000	<u>9.429.000</u>	7.828.000	-17%	-17%
<i>Markets with missing information for some years</i>	2010	2011	2012	2013	2014	2015	2016	% change vs. 2015	% change vs. peak (since 2010)
Italy (Rai 3, final part, "all'arrivo")	n.a.	n.a.	768.000	919.000	<u>1.375.000</u>	1.198.000	1.066.000	-11%	-22%
Italy (Rai 3, full broadcast, "diretta")	n.a.	n.a.	n.a.	n.a.	<u>938.000</u>	699.000	749.000	7%	-20%
Italy (Rai Sport)	n.a.	n.a.	n.a.	n.a.	700.000	n.a.	534.000	/	-24%
Italy (Eurosport)	n.a.	n.a.	n.a.	n.a.	75.000	<u>104.000</u>	n.a.	/	/
The Netherlands (VRT)	n.a.	90.000	n.a.	94.000	<u>118.000</u>	n.a.	n.a.	/	/
The Netherlands (Eurosport)	n.a.	n.a.	n.a.	n.a.	n.a.	4.000	8.000	100%	/
Spain (Teledeporte, first part)	n.a.	n.a.	n.a.	436.000	277.000	<u>495.000</u>	352.000	-29%	-29%
Sweden (TV4)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	71.000	/	/
Switzerland (SRFZwei, German)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	75.000	/	/

(Peak scores for a market are underscored and projected on a blue background.)

3. ANALYSIS OF INDIVIDUAL MARKETS

- In Australia on average 240.000 viewers watched the 2016 Tour de France, which is 9% less than last year and only half of the peak audience of 2011.
- A similar picture emerges in Denmark. Danish Tour de France TV audiences dropped by 12% compared to 2015 and are now only just over half of the peak audience of 2011. It should be noted though that Denmark still has the second highest audience share with almost half of the Danish TV viewers watching the Tour de France.
- In Flanders the 2016 Tour de France TV audience is 18% down: from 578.000 to 476.000 viewers on average per stage. However, with a percentage share of 8% of Flemish people watching the Tour de France and an audience share of over 70% for some stages, Flanders still has the highest TV ratings in the world for the Tour de France. For instance: stage 20 had an impressive audience share of 73,5%, which means that 3 out of 4 people watching TV in Flanders in the afternoon were watching the Tour
- In France TV audiences dropped by 5% for broadcasts before 15h on France3 and by 13% (or about half a million viewers) for broadcasts after 15h on France2. With its 3,5 million TV audience, France remains the country that has the highest average number of viewers per stage.
- In Germany Eurosport's TV audience for the Tour de France fell dramatically by 33% to 235.000. Surprisingly, there was no shift from TV viewers to ARD, that had about the same number of viewers (-1%) as last year, when it restarted broadcasting the Tour de France again. The total German TV audience for the Tour de France now only equals about 1,35 million per stage, while it was 1,65 million in 2010 and over 3 million between 1997 and 2005.

- Because of the multitude of channels that broadcast the Tour and the various programme lengths, it is always difficult to make a precise assessment of the TV audiences in **Italy**. When we look at the final part of the race broadcast on Rai3, there was a drop of 11% in Italian TV interest for the Tour de France to just over 1 million TV viewers. However, the longer broadcast of the stage on the same channel seems to have attracted 7% extra interest compared to last year. On RaiSport another half a million Italians watched the Tour de France, which is again less than in previous years. Overall, taking account of a likely audience of about 100.000 Italian Eurosport TV viewers, we estimate the global Italian TV audience for the 2016 Tour de France at about 1,6 million, which is nowhere near the 2+ million TV audience for the 2014 Tour or the 1,9 million for the 2015 edition.
- In **the Netherlands** TV interest fell back dramatically by 32% from a record breaking 1.104.000 viewers to just 746.000 and is now back at the 2012-2014 level. Viewership on Dutch Eurosport doubled, but remained marginal with only 8.000 (!) people on average watching the live Tour de France stages via the sports channel.
- Also in **Norway** the Tour de France TV audience fell back to the 2012-2014 level. Norwegian TV interest in the Tour decreased by 19% from last year's peak of 174.000 to 141.000.
- In **Spain** TV interest in the Tour de France decreased by almost a third. The final part of the stages gathered on average 982.000 viewers, which is 26% less than in 2015. However, viewership in Spain largely depends on the broadcaster. For the 11 stages where the final hour of the race was aired by the smaller public sports channel Teledporte the average TV audience equaled 521.000. For the other 10 stages, where the final hour of the race was broadcast by the major Spanish public channel La1, the average audience equaled 1.489.000, which is almost a million more. Changes in TV ratings for the Tour de France in Spain over the years are therefore also often the result of the variable choices of the broadcasters. However, because also the first part of the race (which is always broadcast on Teledporte for already a number of years now) recorded a significant drop in TV interest (-29% from 495.000 to 352.000), we can safely conclude that Spanish TV interest in the Tour de France was significantly lower in 2016.

- For the first time, we were able to find Tour de France TV viewing data for **Sweden**. Public channel TV4 did not broadcast the Tour in the past 6 years and recorded a 71.000 per stage average TV audience for its first year of broadcast in 2016. On Swedish Eurosport, the Tour de France is broadcast since at least 2003 with small average audiences of 20.000 to 50.000 at most. In 2016 on average 28.000 Swedish cycling fans watched the Tour de France via Swedish Eurosport, a 3% drop compared to 2015.
- Also for the German speaking part of **Switzerland** for the first time Tour de France TV viewing data were found. The coverage of the Tour de France in this market is highly variable and depends on the availability of other sports events. As a result, only 15 stages were broadcast live, and some stages only got a coverage of half an hour or less. On average, 75.000 cycling fans watched the Tour de France in this part of Switzerland. Since no historic data are available, it is not yet possible to make any comparison with previous years.
- **The UK** is the only market with a (small) increase in TV audiences for the Tour de France (+2%). The victories of Christopher Froome have, in fact, gradually generated more TV interest in the UK for the Tour de France, from 606.000 TV viewers in 2013, to 687.000 in 2015 and 698.000 in 2016. The 2016 British Tour de France audience now almost equals the peak audience recorded in 2012, when the hugely popular Bradley Wiggins won the Tour. It should be noted that the audience data for the UK refer to the 7 p.m. evening highlights show, and not to the live afternoon broadcast.
- Tour de France TV audiences in **the US** fell by 19% and are now back at the 2012-2014 level. On average, only 296.000 Americans watched this year's Tour de France. This is a third below the 2010 audience and only a fifth of the total number of viewers at the end of the reign of Lance Armstrong in 2004-2005 when over 1,5 million Americans watched the Tour de France.
- In **Wallonia** the number of Tour de France viewers dropped by 13% to 200.000 viewers. This is 29% below the peak of 2011, when 280.000 Walloon TV viewers watched the Tour.

4. ANALYSIS OF AUDIENCE SHARES

- Traditionally, the highest audience shares for cycling races are found in Flanders. This year's Tour de France recorded an average per stage audience share of 62,2% in Flanders, which implies that on a typical July afternoon, 6 out of 10 Flemish TV viewers are watching the tour de France. This share is about 3% lower than in 2015 when 2 out of 3 Flemish TV viewers watched the Tour de France.
- In Denmark, Norway and the Netherlands, the audience share for Tour de France stages was between 40 and 50%, while in the home country of the Tour de France a relatively low average share of only 36,8% was recorded, which is 1,5% less than in 2015. The lowest audience shares for the Tour de France are recorded in Germany and Spain where only about 1 out of 10 TV viewers are watching the Tour de France.
- The stages with the lowest audience share are typically the first stage (in 3 markets) and the last stage (in 4 markets). For the last stage this makes sense because it is broadcast in primetime evening when much more TV viewers are present, thereby reducing the Tour de France's audience share. There is no typical stage that records the highest audience share when comparing countries.
- See the table below for a complete overview.

<i>Rank</i>	<i>Market</i>	<i>Overall audience share</i>	<i>Highest audience share stage</i>	<i>Lowest audience share stage</i>
1	Flanders (VRT)	62,2	73,5 (Stage 20, Morzine)	46,2 (Stage 21, Paris)
2	Denmark (TV2)	49,5	62,6 (Stage 19, Saint Gervais Mont Blanc)	38,9 (Stage 21, Paris)
3	Norway (NRK2)	41,2	48,8 (Stage 1, Utah Beach)	34,3 (Stage 13, Pont d'Arc)
4	The Netherlands (NPO)	41,1	53,8 (Stage 18, Megève)	28,1 (Stage 2, Cherbourg)
5	France (France 2)	36,8	46,4 (Stage 20, Morzine)	27,7 (Stage 1, Utah Beach)
6	Wallonia (RTBf)	29,1	38,8 (Stage 12, Mont Ventoux)	17,9 (Stage 18, Mégève)
7	German speaking Switzerland (SRFZwei)	20,3	38,5 (Stage 16, Berne)	11,4 (Stage 1, Utah Beach)
8	Sweden (TV4 + Eurosport)	14,7	19,5 (Stage 16; Berne)	5,3 (Stage 21, Paris)
9	Germany (ARD only)	9,7	13,1 (Stage 8, Bagnères-de-Luchon)	7,2 (Stage 1, Utah Beach)
10	Spain (Teledeporte / La 1)	8,5	14,9 (Stage 8, Bagnères-de-Luchon)	2,8 (Stage 21, Paris)

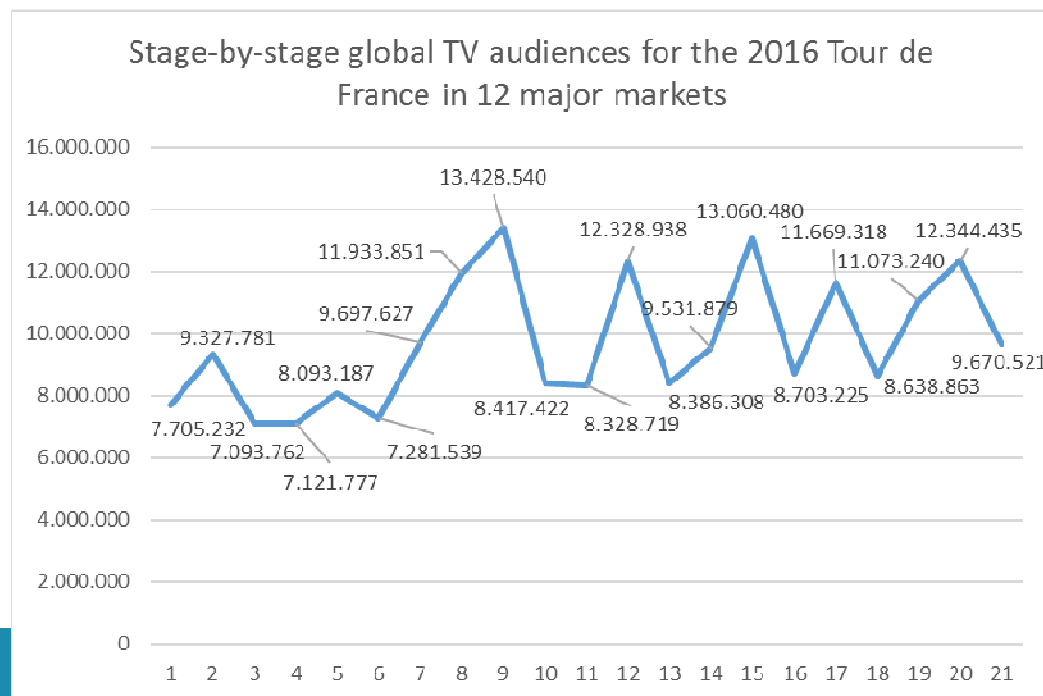
(Note: no information on audience share was available for Australia, Italy, the UK and the USA)

5. BEST WATCHED STAGES

- Based on detailed individual stage information from 12 markets (all countries in the dataset, except Australia and Switzerland), we find that stage 9 in the Pyrenees with the mountain top finish on Andorre Aracalis was this year's best watched stage with a global audience of 13,43 million viewers in these countries.
- Stage 15 (Bourg-en-Bresse – Culoz), another mountain stage (now in the Alpes), comes second in this year's list of best watched stages with a global estimated audience of 13,06 million viewers and a third mountain stage completes the podium: stage 20 (Megève – Morzine) was watched by 12,34 million persons.
- There is a huge diversity in the best watched stage per country: stage 9 (Andorre) was the best watched stage in Denmark and on France 2, stage 15 (Culoz) in Italy, the Netherlands and Wallonia, stage 12 (Mont Ventoux) in the UK and on France 3 and stage 17 (Finhaut-Emosson) in Flanders, Germany (Eurosport) and Spain. The final stage into Paris was the best watched stage in the United States and on the German public channel ARD. The Scandinavian audience had a different preference: stage 8 (Bagnères-de-Luchon) was the best watched on Eurosport in Sweden while stage 14 (Villars-les-Dombes Parc des Oiseaux) was the best watched stage on TV 4 in Sweden. Surprisingly, stage 2 (Cherbourg), a flat stage, was the best watched stage in Norway.

10 BEST WATCHED STAGES: International total

Rank	Stage	Viewers (in millions)	Best watched stage in...
1	Stage 9: Vielha Val d'Aran - Andorre Arcalis	13,43	Denmark, France 2
2	Stage 15: Bourg-en-Bresse - Culoz	13,06	Italy, the Netherlands, Wallonia
3	Stage 20: Megève - Morzine	12,34	
4	Stage 12: Montpellier - Mont Ventoux	12,33	France 3, United Kingdom
5	Stage 8: Pau - Bagnères-de-Luchon	11,93	Sweden (Eurosport)
6	Stage 17: Berne - Finhaut-Emosson	11,67	Flanders, Germany (Eurosport), Spain
7	Stage 19: Albertville - Saint-Gervais Mont Blanc	11,07	
8	Stage 7: L'Isle-Jourdain - Lac de Payolle	9,7	
9	Stage 21: Chantilly - Paris Champs-Élysées	9,67	Germany (ARD), USA
10	Stage 14: Montélimar - Villars-les-Dombes Parc des Oiseaux	9,53	Sweden (TV4)



BEST WATCHED STAGE PER CHANNEL

<i>Market</i>	<i>Stage</i>	<i>Viewers</i>
Denmark (TV2 + TV2 Sport)	Stage 9: Vielha Val d'Aran – Andorre Arcalis	376.329
Flanders (VRT)	Stage 17: Berne – Finhaut-Emosson	663.491
France (France 2)	Stage 9: Vielha Val d'Aran – Andorre Arcalis	5.229.000
France (France 3)	Stage 12: Montpellier – Mont Ventoux	3.300.000
Germany (ARD)	Stage 21: Chantilly - Paris / Champs-Élysées	1.570.000
Germany (Eurosport)	Stage 17: Berne – Finhaut-Emosson	320.000
Italy (Rai 3)	Stage 15: Bourg-en-Bresse – Culoz	1.665.000
The Netherlands (NPO)	Stage 15: Bourg-en-Bresse – Culoz	1.022.000
Norway (NRK2)	Stage 2: Saint-Lô – Cherbourg-Octeville	207.000
Spain (La 1)	Stage 17: Berne – Finhaut-Emosson	1.734.000
Sweden (TV4)	Stage 14: Montélimar – Villars-les-Dombes Parc des Oiseaux	105.000
Sweden (Eurosport)	Stage 8: Pau – Bagnères-de-Luchon	45.000
United Kingdom (ITV)	Stage 12: Montpellier – Mont Ventoux	902.000
USA (NBCSN)	Stage 21: Chantilly - Paris / Champs-Élysées	489.000
Wallonia (RTBf)	Stage 15: Bourg-en-Bresse – Culoz	261.423

6. AVERAGE VIEWING FOR TOUR TALKSHOWS

Market	Talkshow	2011	2012	2013	2014	2015	2016
Flanders	Vive le Vélo (Eén)	770.000	752.000	774.000	613.000	752.839	719.093 (-4%)
France	Village Départ (France 3)	/	+/- 1.000.000	1.234.000	+/- 1.000.000	+/- 1.150.000	+/- 1.000.000 (-13%)
France	Vélo Club (France 2)	/	+/- 2.000.000	1.840.000	+/- 2.000.000	+/- 1.850.000	+/- 1.700.000 (-8%)
Italy	Tour replay (Rai)	/	/	/	/	613.316	536.188 (-13%)
The Netherlands	2011-2014, 2016: De Avondetappe 2015: Studio Tour (Nederland Eén)	1.076.000	877.000	953.000	917.000	856.087	870.957 (+2%)
The Netherlands	Tour du Jour (RTL 7)	482.000	591.000	424.000	314.000	301.958	Not broadcast

TV interest in the Flemish talkshow Vive le Vélo fell by 4% in 2016 to the second lowest average audience in 6 years. In France and Italy, pre and post stage Tour de France talkshows saw a drop in interest of about 10%. In the Netherlands, the reinstated late evening talkshow Avondetappe recorded a 2% higher TV rating than last year's early evening talkshow Studio Tour. **In all countries, the 2016 average audiences are well below the historical peaks recorded in the 2011-2014 period:** -7% in Flanders, -19% (Village Départ) and -15% (Vélo Club) in France and -19% in the Netherlands.